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# USDA User Profile Guidance

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Step-by Step  
Instructions for  
Creating/Modifying  
Coordinators &  
Approving Officials  
Information

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USDA OPPM Charge Card  
Service Center

Originated March 2009

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This guide was developed with the assistance of US Bank to provide Coordinators with step-by-step instructions to create/modify user ids for LAPCs and Approving Officials (AO)s. APCs have the capability to create/modify user ids for LAPCs. LAPCs have the capability to create/modify user ids for AOs.

This quick reference guide is to be used together with the User Profile User Guide found on <https://wbt.access.usbank.com>. Additional questions about this guidance should be directed to the USDA OPPM Charge Card Service Center at [ccsc@da.usda.gov](mailto:ccsc@da.usda.gov).

## USDA User Profile Step-by-Step

(Setting Up A New User)

1) Select  
System  
Administration

2) Select  
User  
Profile

Personal | Business | Institution / Government | About U.S. Bancorp

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U.S. Bank Access® Online

Request Status Queue  
Active Work Queue  
System Administration  
User Profiles  
Financial Extract Controls  
Accounting Code Mgmt  
Merchant Groups  
Merchant Allocation Rules  
Allocation Rules Engine  
Global Affiliate Groups

Account Administration  
Order Management  
Transaction Management  
Travel Expense Management  
Data Exchange  
Account Information  
Reporting  
My Personal Information

Home  
Contact Us

User Profiles  
User Setup and Search

To locate a specific user, also [Setup a new user](#).

User ID:

User Last Name:  
OR

Account Number:  
OR

4) Select "Setup a new user" to create a new user ID. Prior to setting up user, run an "Account List Report" to determine if a cardholder exists at that level or use Account Administration to search for specific cardholder. If cardholder exists, you can set up user at that level. If not, submit the *Reporting Hierarchy Setup Form* as indicated on the form.

3) Search for prospective user by name to determine if user ID exists. If name appears, go to step 6. If not, go to step 4.

- User Profile gives USDA APC/LAPC/LFPCs the ability to setup new user IDs for APCs/LAPCs/LFPCs/AOs that sit below them in their hierarchy real time in Access Online
- Simply log in to Access Online, select System Administration, select User Profile, and begin
- Prior to using the feature to "setup a new user", use the "Search" function to determine if the requested user has an existing user profile. Enter the user's last name; then click "Search". If the user's name appears in the list as an LAPC/APC (PAGC-APC-LAPC) or AO (PAGC-AO4), then click on the name and perform applicable edits.

## Setting Up A New User Cont'd

The screenshot shows the 'User Profiles' management interface. A yellow callout bubble points to the 'Enter the user login information.' instruction, stating: '5) Enter the required fields on the screen.' Another yellow callout bubble points to the 'Functional Entitlement Group' field, stating: 'Continued on following page.'

**Request Status Queue**  
**Active Work Queue**  
**System Administration**  
User Profiles  
Financial Extract Controls  
Accounting Code Mgmt  
Merchant Groups  
Merchant Allocation Rules  
Allocation Rules Engine  
Global Affiliate Groups  
**Account Administration**  
**Order Management**  
**Transaction Management**  
**Travel Expense Management**  
**Data Exchange**  
**Account Information**  
**Reporting**  
**My Personal Information**

**Home**  
**Contact Us**

**User Profiles**  
**Manage Login Information**

Enter the user login information.

**User Type:** Client User

**User Access Status:**  
Active

\* = required

Last Name:\* First Name:\* MI:  
Example USDAO

User ID: (7 to 20 alpha-numeric characters)  
USDAOEXAMPLE

☐ Data Exchange Batch Script

Password: (8 to 20 alpha-numeric characters OR 12 to 20 alpha-numeric characters for Data Exchange Batch Script)  
.....

Re-enter Password:  
.....

Authentication Question:  
Pet's Name

Authentication Response:  
Spot

Functional Entitlement Group:  
Hold down the Ctrl key to make multiple selections  
CH Full View Functional Entitlement Group detail

★ Log Out

- Fill out the required fields on the first screen to set up log-in information
- Required fields are indicated with a red asterisk (\*)

## Setting Up A New User Cont'd

The screenshot shows the 'My Personal Information' section of the USDA User Profile Setup form. The left sidebar contains links: Travel Expense Management, Data Exchange, Account Information, Reporting, My Personal Information, Home, and Contact Us. The main form fields include:

- User ID:** \* (7 to 20 alpha-numeric characters). Example: USDAAOEXAMPLE.
- ☐ Data Exchange Batch Script
- Password:** \* (8 to 20 alpha-numeric characters OR 12 to 20 alpha-numeric characters for Data Exchange Batch Script). Masked with dots.
- Re-enter Password:** \* Masked with dots.
- Authentication Question:** \* Pet's Name (dropdown menu).
- Authentication Response:** \* Spot (text input).
- Functional Entitlement Group:** \* Hold down the Ctrl key to make multiple selections. Options: CH Full, PA Admin, PA Finance. A link 'View Functional Entitlement Group detail' is provided.
- Accounting Code View:** 1 (dropdown menu).
- Buttons:** Save, << Back to User.

**Callouts:**

- Yellow callout (left):** ONLY use Accounting Code View 1 for USDA user IDs
- Orange callout (bottom center):** When finished, hit "save"
- Yellow callout (right):** Please refer to the FEG matrix on the User Profile Setup and Maintenance Overview or see below to assign the correct FEG to the user that you wish to create

Footer: © 2009 U.S. Bancorp | usb demo1

USDA FEGs to be utilized in User Profile	User Type	Description
PAGC_APC-LAPC	USDA specific APC FEG	Account Setup and Maintenance, Transaction Management and Allocation, Fleet reporting
PAGC_AO4	USDA specific AO FEG	No Account Setup and Maintenance, no allocation and limited reporting
PAGC_RPT	Reporting only FEG	Standard reporting
PAGC_AO2	View only APC FEG	View only: Account Administration, Transaction Management and Standard reporting

### FEG matrix

- **For Purchase program use:**
  - **PAGC\_APC-LAPC (LAPC/APC),**
  - **PAGC\_AO4 (AO),**
  - **PAGC\_RPT,**
  - **PAGC\_AO2 (Financial POC)**

## Setting Up A New User Cont'd

**Request Status Queue**  
**Active Work Queue**  
**System Administration**  
 User Profiles  
 Financial Extract Controls  
 Accounting Code Mgmt  
 Merchant Groups  
 Merchant Allocation Rules  
 Allocation Rules Engine  
 Global Affiliate Groups

**Account Administration**  
**Order Management**  
**Transaction Management**  
**Travel Expense Management**  
**Data Exchange**  
**Account Information Reporting**  
**My Personal Information**

Home  
Contact Us

**User Profiles**  
**User Profile Summary**  
 Example, USDAAO

[★ Log Out](#)

**Login Information** [Edit](#)  
**Last Name:** Example  
**First Name:** USDAAO  
**MI:**  
**Organization Short Name:** ACAG16  
**User ID:** USDAAOEXAMPLE  
**User Access Status:** Active  
**Date Created:** 02/13/2009  
**Created By:** pa1agency  
**Date Last Changed:** 02/13/2009  
**User Authentication Category:** Pet's Name  
**Accounting Code View:** 1  
**Functional Entitlement Group(s):** PA Admin

**Account Assignments** [Edit](#)  
 Card Type Account Number Account Status Design

**Hierarchy Assignments**

- [View/Add Processing Hierarchy Assignments](#)
- [View/Add Reporting Hierarchy Assignments](#)

**Contact Information** [Edit](#)  
**Address 1:**  
**Address 2:**  
**City:**  
**State/Province:**  
**Zip/Postal Code:**  
**Phone Number:**  
**Fax Number:**  
**Email Address:**  
**Other:**  
**Email Notification:** Statement Notification

**6) Select View/Add processing hierarchy next. You will want to add the equivalent reporting hierarchy as well**

- After clicking “Save”, you are brought to this screen
- You should see the user ID log-in information that you set up at the top of the screen
- Next step, add processing hierarchy to the user ID

## Setting Up A New User Cont'd

**User Profiles**  
Select a Processing Hierarchy Position

**Search for a Hierarchy Position**  
Select the hierarchy level you wish to locate, and enter any known or partial values, then search.

Hierarchy Level:  
Agent

Bank: Agent: Company: Division: Department:

**Search**

To add a position to the Selected Hierarchy Positions, select the position in the list to the left and click "Select Position". When you are satisfied with your selection(s), click "Accept Hierarchy".

**Found Hierarchy Position(s)**  
Records 1 - 1 of 1

Select	Bank	Agent	Comp	Div	Dept
<input type="checkbox"/>	3059	0073			

[Check All Shown](#) | [Uncheck All Shown](#)

Records 1 - 1 of 1

**Accept Hierarchy**

**Selected Hierarchy Position(s)**

Remove	Bank	Agent	Comp	Div	Dept
no hierarchy position(s) selected.					

- **Search for the hierarchy that you wish to link to this user ID**
  - **APCs usually require one or multiple agent levels (level 4s)**
  - **LAPCs usually require one or multiple company levels (level 5s)**
  - **AOs usually require one or multiple division or department levels (level 6 or 7s)**

## Setting Up A New User Cont'd

**Financial Extract Controls**  
 Accounting Code Mgmt  
 Merchant Groups  
 Merchant Allocation Rules  
 Allocation Rules Engine  
 Global Affiliate Groups

**Account Administration**  
 Order Management  
 Transaction Management  
 Travel Expense Management  
 Data Exchange  
 Account Information  
 Reporting  
 My Personal Information

**Home**  
**Contact Us**

**Search for a Hierarchy Position**  
 Select the hierarchy level you wish to locate, and enter any known or partial values, then search.

Hierarchy Level:

Bank:  Agent:  Company:  Division:  Department:

**Search**

To add a position to the Selected Hierarchy Positions, select the position from the list. To remove a selected position from the list, mark the position with the "Remove Position". When you are satisfied with your selection(s), click the "Accept Hierarchy" button.

**Found Hierarchy Position(s)**  
 Records 1 - 1 of 1

Select	Bank	Agent	Comp	Div	Dept
<input type="checkbox"/>	3059	0073			

[Check All Shown](#) | [Uncheck All Shown](#)

Records 1 - 1 of 1

**Accept Hierarchy**

[<< Back to User Profile Summary](#)

**Selected Hierarchy Position(s)**

Remove	Bank	Agent	Comp	Div	Dept
<input type="checkbox"/>	3059	0073			

**8) Select position to add hierarchy**

**When finished, hit "Accept Hierarchy"**

- Place a check mark in the box to the left of the hierarchy you wish to link to the user
- Click on the button, "Select position"
- It should then appear on the right side of the screen under "Selected Hierarchy position"
- Click on the button, "Accept Hierarchy"



## Setting Up A New User Cont'd

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**User Profiles**  
Select a Reporting Hierarchy Position

**Search for a Hierarchy Position**  
Select the hierarchy level you wish to locate, and enter any known or partial values, then search.

Hierarchy Level:  
Level 5

Bank: Level 1: Level 2: Level 3: Level 4: Level 5: Level 6: Level 7:

**Search**

To add a position to the Selected Hierarchy Positions, select the position in the list to the left and click "Select Position". When you are satisfied with your selection(s), click "Accept Hierarchy".

**Found Hierarchy Position(s)**  
Records 1 - 2 of 2

Select	Bank	Lvl 1	Lvl 2	Lvl 3	Lvl 4	Lvl 5	Lvl 6	Lvl 7
<input type="checkbox"/>	3059	64913	22222	33333	44444	55555		
<input type="checkbox"/>	3059	64990	22222	33333	44444	55555		

[Check All Shown](#) | [Uncheck All Shown](#)

**Selected Hierarchy Position(s)**

Remove	Bank	Lvl 1	Lvl 2	Lvl 3	Lvl 4
no hierarchy position(s) selected.					

**Select Position >>** **<< Remove Position**

- Use the same process for reporting hierarchy
- Search for the levels that you wish to link to the user

## Setting Up A New User Cont'd

Allocation Rules Engine  
Global Affiliate Groups

**Account Administration**  
Order Management  
Transaction Management  
Travel Expense Management  
Data Exchange  
Account Information  
Reporting  
My Personal Information

Home  
Contact Us

Hierarchy Level:  
Level 5

Bank: Level 1: Level 2: Level 3: Level 4: Level 5: Level 6: Level 7:

**Search**

To add a position to the Selected Hierarchy Positions, select the position in the list to the left and click "Position". To remove a selected position from the list, mark the position in the list to the right and click "Remove Position". When you are satisfied with your selection(s), click "Accept Hierarchy".

**Found Hierarchy Position(s)**  
Records 1 - 2 of 2

Select	Bank	Lvl 1	Lvl 2	Lvl 3	Lvl 4	Lvl 5	Lvl 6	Lvl 7
<input type="checkbox"/>	3059	64913	22222	33333	44444	55555		
<input type="checkbox"/>	3059	64990	22222	33333	44444	55555		

[Check All Shown](#) | [Uncheck All Shown](#)

Records 1 - 2 of 2

**Accept Hierarchy**

[<< Back to User Profile Summary](#)

**Selected Hierarchy Position(s)**

Remove	Bank	Lvl 1	Lvl 2	Lvl 3	Lvl 4
<input type="checkbox"/>	3059	64913	22222	33333	44444

**10) Select position to add hierarchy**

**11) When finished, hit "Accept Hierarchy"**

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- Select them with a check mark
- Accept the hierarchy
- You may also remove hierarchy from a user
  - Place a check mark in the hierarchy you wish to remove
  - Click on the button, "Remove position"
  - Accept Hierarchy
- *Note: Remember to add new hierarchy to a user before removing old hierarchy. If a user ID has all hierarchy removed you will lose the ability to maintain that user because he/she is no longer tied to your own hierarchy.*
- *See page 15 to remove a user ID altogether*

## Setting Up A New User Cont'd

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**U.S. Bank Access® Online**

★ Log Out

**Request Status Queue**  
**Active Work Queue**  
**System Administration**  
 User Profiles  
 Financial Extract Controls  
 Accounting Code Mgmt  
 Merchant Groups  
 Merchant Allocation Rules  
 Allocation Rules Engine  
 Global Affiliate Groups  
**Account Administration**  
**Order Management**  
**Transaction Management**  
**Travel Expense Management**  
**Data Exchange**  
**Account Information Reporting**  
**My Personal Information**

**User Profiles**  
**User Profile Summary**  
 Example, USDAAO

**Login Information** [Edit](#)

**Last Name:** Example  
**First Name:** USDAAO  
**MI:**

**Organization Short Name:** ACAG16  
**User ID:** USDAAOEXAMPLE

**User Access Status:** Active  
**Transaction Approval Manager:** No  
**Date Created:** 02/13/2009  
**Created By:** pa1agency  
**Date Last Changed:** 02/13/2009

**User Authentication Category:** Pet's Name  
**Accounting Code View:** 1  
**Functional Entitlement Group(s):** PA Admin

**Account Assignments** [Edit](#)

Card Type	Account Number	Account Status	Designated User	User ID

**Hierarchy Assignments**

- [View/Add Processing Hierarchy Assignments](#)
- [View/Add Reporting Hierarchy Assignments](#)

Home  
Contact Us

- To enable a user as an approval manager (purchase APCs, LAPCs, AOs), click the login information edit link after linking hierarchy to the user ID
- By selecting the Approval Manager box, cardholders will be able to select and send approved transactions to this user for Final Approval

## Setting Up A New User Cont'd

The screenshot shows the 'Enter the user login information.' form. On the left is a blue sidebar with navigation links: Financial Extract Controls, Accounting Code Mgmt, Merchant Groups, Merchant Allocation Rules, Allocation Rules Engine, Global Affiliate Groups, Account Administration, Order Management, Transaction Management, Travel Expense Management, Data Exchange, Account Information, Reporting, My Personal Information, Home, and Contact Us. The form fields include: User Type (Client User), User Access Status (Active), Last Name (Example), First Name (USDAAO), MI ( ), User ID (USDAAOEXAMPLE), Password ( ), Re-enter Password ( ), Authentication Question (Pet's Name), Authentication Response (Spot), Transaction Approvals (checked), Functional Entitlement Group (PA Admin selected), and Accounting Code View (1). Two callouts are present: a yellow box pointing to the 'Approval Manager' checkbox with the text '13) Place a check mark here if you wish to enable your user as an approval manager', and an orange starburst pointing to the 'View Functional Entitlement Group detail' link with the text '14) Click “save” when'.

Enter the user login information.

**User Type:** Client User **User Access Status:** Active

\* = required

Last Name:\* First Name:\* MI:

Example USDAAO

User ID:\* (7 to 20 alpha-numeric characters)

USDAAOEXAMPLE

Password:\* (8 to 20 alpha-numeric characters OR 12 to 20 alpha-numeric characters for Data Exchange Batch Script)

Re-enter Password:\*

Authentication Question:\*

Pet's Name

Authentication Response:\*

Spot

**Transaction Approvals** ☒ Approval Manager

Functional Entitlement Group:\*

Hold down the Ctrl key to make multiple selections

CH Full  
PA Admin  
PA Finance

[View Functional Entitlement Group detail](#)

Select only one group at a time to view detail.

Accounting Code View:

1

**13) Place a check mark here if you wish to enable your user as an approval manager**

**14) Click “save” when**

- After placing the check mark in the Approval Manager box, click “save”

## Setting Up A New User Cont'd

Global Affiliate Groups

Account Administration

Order Management

Transaction Management

Travel Expense Management

Data Exchange

Account Information

Reporting

My Personal Information

Home

Contact Us

First Name: USDAO

MI:

Organization Short Name: ACAG16

User ID: USDAOEXAMPLE

User Access Status: Active

Transaction Approval Manager: Yes

Date Created: 02/13/2009

Created By: pa1agency

Date Last Changed: 02/13/2009

User Authentication Category: Pet's Name

Accounting Code View: 1

Functional Entitlement Group(s): PA.Admin

Account Assignments [Edit](#)

Card Type

Account Number

Account Status

Designated User

User ID

Hierarchy Assignments

- [View/Add Processing Hierarchy](#)
- [View/Add Reporting Hierarchy](#)

Contact Information [Edit](#)

Address 1: 1025 Connecticut Ave NW

Address 2:

City: Washington

State/Province: DC

Zip/Postal Code: 20036

Country: United States

Phone Number: 202-555-1122

Fax Number:

Email Address: usdaao@usda.example.gov

Other:

Email Notification: Data Exchange

Pending Transaction Approval

Statement Notification

[Back to User Profile Home](#)

15) Click here to add address, email, and email notification information

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- Select the Contact Information edit link to add the address, email, and email notification detail

## Setting Up A New User Cont'd

Example, USDAAO

Enter the user contact information.

\* = required

**16) Enter required information as indicated by red asterisk.**

Last Name:\* First Name:\* MI:

Example USDAAO

Address 1:\* Address 2:

1025 Connecticut Ave NW

City:\* State/Province:\* Zip/Postal Code:\*

Washington DC 20036

Country:\*

United States

Phone Number:\* Fax Number:

202-555-1122

Email Address:\*

usdaao@usda.example.gov

Other:

**Email Notification**

☒ **Data Exchange**

Hold down the Ctrl key to make multiple selections.

All  
Successful Upload  
Unsuccessful Upload  
Successful Download  
Unsuccessful Download

☐ **Pending Transaction Approval**

☒ Daily

**Select information as indicated on page.**

- Fill in the required fields indicated with a red asterisk (\*)
- Select Data Exchange to allow users to schedule reports and when to be notified by email if a report is populated for the user

## Setting Up A New User Cont'd

**Email Notification**

☒ **Data Exchange**  
Hold down the Ctrl key to make multiple selections.

- All
- Successful Upload
- Unsuccessful Upload
- Successful Download
- Unsuccessful Download

☒ **Pending Transaction Approval**

☐ Daily

☒ Weekly: Wednesday

☐ Send notification only when there are transactions to approve.

**Statement Notification**

Select accounts below to receive email notification when a statement is available in Access Online.

Accounts associated directly to this user id:

Status	Account Number	Account Name	Account Type

Accounts viewed through assigned hierarchy: [Add Managing Accounts](#)  
[Add Cardholder Account](#)

[Remove](#) [Account](#) [Type](#)

**Save**

**Select information as indicated on this page.**

**Click "save" when finished**

- Select “Pending Transaction Approval” to enable email notification when an approved transaction awaits the user’s final approval in their Approval Manager Queue
- Select when the user should be notified of approved transactions in their queue
  - The default selection for USDA is weekly on Wednesdays
- Ignore statement notification for all product lines
- Hit “save”.

## Setting Up A New User Cont'd

Global Affiliate Groups <b>Account Administration</b> <b>Order Management</b> <b>Transaction Management</b> Travel Expense Management Data Exchange Account Information Reporting My Personal Information  Home Contact Us	<b>First Name:</b> GEBVVO <b>MI:</b>		<b>User Authentication Category:</b> Pet's Name <b>Accounting Code View:</b> 1											
	<b>Organization Short Name:</b> ACAG16 <b>User ID:</b> USDAAOEXAMPLE		<b>Functional Entitlement Group(s):</b> PA Admin											
	<b>User Access Status:</b> Active <b>Transaction Approval Manager:</b> Yes <b>Date Created:</b> 02/13/2009 <b>Created By:</b> pa1agency <b>Date Last Changed:</b> 02/13/2009													
	<b>Account Assignments</b> <a href="#">Edit</a>													
<table border="1"> <thead> <tr> <th>Card Type</th> <th>Account Number</th> <th>Account Status</th> <th>Designated User</th> <th>User ID</th> </tr> </thead> <tbody> <tr> <td colspan="5"> <b>Hierarchy Assignments</b> <ul style="list-style-type: none"> <li><a href="#">View/Add Processing Hierarchy Assignments</a></li> <li><a href="#">View/Add Reporting Hierarchy Assignments</a></li> </ul> </td> </tr> </tbody> </table>					Card Type	Account Number	Account Status	Designated User	User ID	<b>Hierarchy Assignments</b> <ul style="list-style-type: none"> <li><a href="#">View/Add Processing Hierarchy Assignments</a></li> <li><a href="#">View/Add Reporting Hierarchy Assignments</a></li> </ul>				
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<b>Contact Information</b> <a href="#">Edit</a> <b>Address 1:</b> 1025 Connecticut Ave NW <b>Address 2:</b> <b>City:</b> Washington <b>State/Province:</b> DC <b>Zip/Postal Code:</b> 20036 <b>Country:</b> United States  <a href="#">&lt;&lt; Back to User Profile Home</a>														
<b>Phone Number:</b> 202-555-1122 <b>Fax Number:</b> <b>Email Address:</b> usdaao@usda.example.gov <b>Other:</b> <b>Email Notification:</b> Data Exchange Pending Transaction Approval Statement Notification														

**You have successfully created a user profile!**

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- You will now see the User Profile Summary screen with your updates to the contact information
- Unless you need to maintain something, your request is complete and the user ID is created and ready to be used
- *Note: Approval Manager updates load overnight*



## Removing a User ID

The screenshot shows the U.S. Bank Access Online interface. The top navigation bar includes links for Personal, Business, Institution / Government, and About U.S. Bancorp. The user is logged in as ACME16 Agency. The left sidebar contains a menu with categories like Request Status Queue, Active Work Queue, System Administration, Account Administration, Order Management, Transaction Management, Travel Expense Management, Data Exchange, Account Information, Reporting, and My Personal Information. The main content area is titled 'User Profiles' and shows the 'User Profile Summary' for 'Example, USDAAO'. The 'Login Information' section includes fields for Last Name, First Name, MI, Organization Short Name, User ID, User Access Status, Transaction Approval Manager, Date Created, Created By, and Date Last Changed. The 'Edit' link is highlighted with a yellow callout box containing the text '1) Click on this link to remove a user ID'. Below the 'Login Information' section is the 'Account Assignments' section, which includes a table with columns for Card Type, Account Number, Account Status, Designated User, and User ID. The 'Hierarchy Assignments' section includes links for 'View/Add Processing Hierarchy Assignments' and 'View/Add Reporting Hierarchy Assignments'.

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★ Log Out

**User Profiles**  
**User Profile Summary**  
Example, USDAAO

**Login Information** [Edit](#)

Last Name: Example  
First Name: USDAAO  
MI:  
Organization Short Name: ACAG16  
User ID: USDAAOEXAMPLE  
User Access Status: Active  
Transaction Approval Manager: Yes  
Date Created: 02/13/2009  
Created By: pa1agency  
Date Last Changed: 02/13/2009

User Authentication Category: Pet's Name  
Accounting Code View: 1  
Functional Entitlement Group(s): PA.Admin

**Account Assignments** [Edit](#)

Card Type	Account Number	Account Status	Designated User	User ID
Hierarchy Assignments				

- [View/Add Processing Hierarchy Assignments](#)
- [View/Add Reporting Hierarchy Assignments](#)

- To remove a user ID, search for the user by user ID or name
- Click on the login information edit link

**User Profiles**  
Manage Login Information

Enter the user login information.

**User Type:** Client User

\* = required

**User Access Status:**  
 Removed  
 Active  
 Inactive  
 Removed

**Last Name:** Example **First Name:** USDAAO **MI:**

**User ID:** (7 to 20 alpha-numeric characters)  
USDAAOEXAMPLE

**Password:** (8 to 20 alpha-numeric characters OR 12 to 20 alpha-numeric characters for Data Exchange Batch Script)

**Re-enter Password:**

**Authentication Question:**  
Pet's Name

**Authentication Response:**  
Spot

**Transaction Approvals** ☒ Approval Manager

**Functional Entitlement Group:**  
Hold down the Ctrl key to make multiple selections  
CH Full

★ Log Out

**2) Select appropriate action.**

**3) Click "save" when**

- Select “Removed” from the drop-down box under User Access Status to remove a user
- You may also choose to make a user “inactive” if you do not wish to permanently remove the user ID
  - A user cannot log-in to Access Online if their status is “inactive”
- Click on “save” and your request is completed

*For further questions contact customer service, the technical helpdesk, or your account coordinator*